



# **Task Order Request for Proposal (TORFP) Process for Master Contractors**

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# Agenda

- Ten TORFP Process Steps
- Do's & Don'ts
- Q&A

# TORFP Process

- Step 1 - Receipt of the TORFP
- Step 2 - TO Proposal Preparation
- Step 3 - Proposal Formulation
- Step 4 - Proposal Submission
- Step 5 - Evaluation of Technical TO Proposals
- Step 6 - Evaluation of Financial TO Proposals
- Step 7 - Award of the TO Agreement
- Step 8 - Debriefing Unsuccessful Offerors
- Step 9 - Commencement of Work
- Step 10 - Post Award Activities

## Step 1 - Receipt of the TORFP

- The TO requesting agency emails the TORFP directly to each Master Contractor in the applicable functional area
- From receipt of the TORFP, the TO Procurement Officer is the sole point of contact for the TORFP
- The Key Information Summary Sheet included with the TORFP provides a summary of the TORFP

# Key Information Summary Sheet

<b>TORFP Title:</b>
<b>Functional Area:</b>
<b>TORFP Issue Date:</b>
<b>Closing Date and Time:</b>
<b>TORFP Issuing Agency:</b>
<b>Send Questions and Proposals to:</b>
<b>TO Procurement Officer:</b>
<b>TO Manager:</b>
<b>TO Project Numbers:</b>
<b>TO Type:</b>
<b>Period of Performance:</b>
<b>MBE Goal:</b>
<b>Small Business Reserve (SBR):</b>
<b>Primary Place of Performance:</b>
<b>State Furnished Work Site and/or Access to Equipment, Facilities or Personnel:</b>
<b>TO Pre-proposal Conference: (Date &amp; Location)</b>

KEY INFORMATION SUMMARY SHEET	
<p>This Small Business Reserve (SBR) Consulting and Technical Services (CATS) Task Order Request for Proposals (TORFP) is issued to obtain the services necessary to satisfy the requirements defined in Section 2 - Scope of Work. Only SBR CATS Master Contractors approved to perform work in the functional area under which this TORFP is issued are invited to submit a Task Order (TO) Proposal to this TORFP. Those SBR Master Contractors (herein referred to as Master Contractors) deciding not to submit a TO Proposal are required to submit the reason(s) why per section 3.1 Required Response of the TORFP. In addition to the requirements of this TORFP, the Master Contractors are subject to all terms and conditions contained in the CATS RFP issued by the Maryland Department of Budget and Management, Office of Information Technology and subsequent Master Contract Project Number 50R5800338, including any amendments.</p>	
<b>TORFP Title:</b>	IV&V Assessment 1-DHR MD CHESSIE IV&V Assessment 2-DLLR MIDAS II
<b>Functional Area:</b>	IT - IT Management Consulting Services
<b>TORFP Issue Date:</b>	02/17/2006
<b>Closing Date and Time:</b>	03/10/2006 at 02:00 PM
<b>TORFP Issuing Agency:</b>	Department of Budget and Management (DBM) Office of Information Technology (OIT) Project Management Office (PMO)
<b>Send Questions and Proposals to:</b>	Procurement Liaison Office (PLO) <a href="mailto:oitplo@dbm.state.md.us">oitplo@dbm.state.md.us</a>
<b>TO Procurement Officer:</b>	Susan S. Woomer Office Phone Number: 410-260-7191 Office FAX Number: 410-974-5615
<b>TO Manager:</b>	Robert Krauss Office Phone Number: 410-260-6135 Office FAX Number: 410-974-5615
<b>TO Project Numbers:</b>	Assessment 1: MD CHESSIE - F10P6200496 Assessment 2: MIDAS II - F10P6200497
<b>TO Type:</b>	Fixed price
<b>Period of Performance:</b>	6 Months
<b>MBE Goal:</b>	30%
<b>Small Business Reserve (SBR):</b>	Yes
<b>Primary Place of Performance:</b>	MD CHESSIE: 1100 Eastern Blvd. Essex, MD 21221 MIDAS II: 500 N. Calvert St. Baltimore, MD 21202
<b>State Furnished Work Site and/or Access to Equipment, Facilities or Personnel:</b>	Workspace, telephones and workstations with Internet access will be provided for up to two of the Contractor's personnel. Hours of work are 8:00 am to 5:00 pm, local time.
<b>TO Pre-proposal Conference:</b>	DBM, 45 Calvert Street Annapolis, MD 21401, 2/24/2002, 10:00 am

## Step 2 - TO Proposal Preparation

- Review the TORFP and assess if interested in responding with a TO Proposal
- If not responding to the TORFP with a TO Proposal, return the Notice to Contractors indicating reasons why. This information is used to assess why ...
- If interested in responding with a TO Proposal, the Master Contractor should attend the pre-proposal conference. Prior to the conference, the Master Contractor should:
  - Read the entire TORFP (including attachments)
  - Formulate questions to ask prior to or at the conference and send them to the TO Procurement Officer
  - Align Minority Business Enterprise (MBE) relationships, invite them to the conference

## Step 2 - TO Proposal Preparation

After the pre-proposal conference, each Master Contractor will receive the following from the TO Procurement Officer:

- A pre-proposal conference summary and the attendees list
- Questions and their responses in written format
- Any amendments to the TORFP

## Step 2 - TO Proposal Preparation

- Master Contractor must express concerns over requirements in the TORFP to the TO Procurement Officer **prior to the due date for submission of proposals in order to be considered**
- Review TO Contractor qualifications found in Section 2 of the TORFP, consider teaming with other contractors, if you do not full meet those qualifications
- Submit Non-Disclosure Agreement (Offeror) to view relevant documentation to assist in preparation of a TO Proposal



## Step 3 - Proposal Formulation

TO Proposals are submitted as two separate documents, Technical and Financial

- Requirements of Technical Submission:
  - Be labeled “TORFP #, TORFP Title, Technical”
  - **Must** include all required MBE documentation (MBE Forms D-1 and D-2). Failure to submit this documentation completed and signed at the time of submission **will result in the State’s rejection of the TO Proposal**

## Step 3 - Proposal Formulation (cont.)

- Requirements of Technical Submission, (cont.):
  - Include, if applicable, completed Conflict of Interest Affidavit, including facts or circumstances that could give rise now or in the future to a conflict of interest
  - Follow Section 3 of the TORFP for proposal format and submission requirements. Section 3 provides detailed instructions as to how to structure the technical proposal

## Step 3 - Proposal Formulation (cont.)

- Requirements of Technical Submission, (cont.):
  - Be organized and unambiguous
  - Minimize misinterpretation
  - Minimize non-relevant information
  - Be aware of differences between required Master Contractor and personnel minimum qualifications and provide evidence that the minimum qualifications in the TORFP are met
  - Conform with all of the requirements of the TORFP
  - Attachments requiring signature submitted in .pdf format

## Step 3 - Proposal Formulation (cont.)

- Requirements of the Financial Proposal:
  - Should be labeled “TORFP #, TORFP Title, Financial”
  - Pricing must include appropriate eMarylandMarketplace fees as outlined in Section 1 of the TORFP
  - Pricing must include all cost information associated with performing the services required in the TORFP
  - Rates cannot be higher than those proposed in the Master Contract

## Step 4 - Proposal Submission

- Submit the TO Proposal as instructed in the TORFP:
  - As two separate files in the format specified
  - By the required date and time
    - **Failure to submit by the specified date and time will result in rejection of the TO Proposal**
  - To the address or email specified in the TORFP
  - Ask for a receipt or confirmation that the TO Proposal has been received

## Step 5 - Evaluation of Technical Proposals

- The TO Procurement Officer will forward only the technical proposals to the evaluation committee. Technical proposals will be evaluated using the evaluation criteria stated in the TORFP. Master Contractors may be asked to:
  - Provide clarifications
  - Give an oral presentation

## Step 5 - Evaluation of Technical Proposals (cont.)

- Technical Proposals deemed qualified will have their Financial Proposals considered
- Master Contractors submitting Technical Proposals deemed not qualified will be notified via email
- When the committee has completed the evaluation of those qualified, technical proposals will be ranked (such as one through five), point are not used

## Step 6 - Evaluation of Financial Proposals

- Next the TO Procurement Officer will distribute the Financial Proposals to the evaluation committee for only those Technical Proposals found qualified
- Financial Proposals will be ranked according to the criteria stated in the TORFP



## Step 6 - Evaluation of Financial Proposals (cont.)

- Master Contractors may be asked to:
  - Attend financial discussions
  - Provide clarifications
  - Submit a Best and Final Offer (BAFO)

## Step 7 - Award of the TORFP

- Award will be made to the most advantageous TO Proposal offer considering technical and financial submissions.
- Master Contractors not receiving the award will be notified and offered the opportunity for a debriefing.

## Step 7 - Award of the TORFP (cont.)

The Master Contractor receiving the award will:

- Complete and sign:
  - Task Order
  - Non-Disclosure (TO Contractor) Agreements
- Return to the TO Procurement Officer the completed and signed Task Order Agreement and the Non-Disclosure Agreement

## Step 7 - Award of the TORFP (cont.)

Submit to the TO Procurement Officer, within 10 days of receiving notification of award, the following as instructed in the TORFP:

- Attachment 2 – MBE Forms:
  - MBE Form D-3, Outreach Efforts Compliance Statement
  - MBE Form D-4, Subcontractor Project Participation Statement
  - MBE waiver documentation as instructed in MBE Form D-1

## Step 8 – Debriefing of Unsuccessful Offerors

Per COMAR 21.05.03.06 the debriefing shall:

- Be limited to discussion of the unsuccessful offeror's proposal and may not include a specific discussion of a competing offeror's proposal
- Be factual and consistent with the evaluation of the unsuccessful offeror's proposal
- Provide information on areas in which the unsuccessful offeror's technical proposal was deemed weak or deficient

## Step 8 – Debriefing of Unsuccessful Offerors (cont.)

Per COMAR 21.05.03.06 the debriefing may not:

- Include discussion or dissemination of the thoughts, notes, or rankings of individual members of an evaluation committee, but may include a summary of the TO Procurement Officer's rationale for the selection decision and recommended award.

## Step 9 - Commencement of Work

- Commencement of work will be initiated only after the TO Contractor receives all of the following:
  - Fully executed Task Order Agreement
  - Fully executed Non-Disclosure Agreement
  - Signed Purchase Order
  - Notice to Proceed authorized by the TO Procurement Officer
- The TO Manager will contact the TO Contractor to schedule a kick-off meeting for the project

## Step 10 - Post Award Activities

- After award of the TORFP, the TO Contractor is responsible for:
  - Providing the services and personnel agreed to and required by the Task Order Agreement
  - Following the required project policies, guidelines and methodologies required in the TORFP
  - Submitting invoices to the TO Manager as required by the TORFP



## Step 10 - Post Award Activities (cont.)

- Complying with the MBE goal set forth in the Task Order Agreement.
- Submitting monthly MBE reports to the TO Manager and TO Procurement Officer, as required by Attachment 2 - MBE Forms, TO Contractor MBE Report Requirements:
  - MBE Form D-5, MBE Participation TO Contractor Paid/Unpaid Invoice Report
  - MBE Form D-6, MBE Participation Subcontractor Paid/Unpaid Invoice Report

## PLEASE DO

- Keep contact information current by:
  - Sending an email to [oitplo@dbm.state.md.us](mailto:oitplo@dbm.state.md.us)
  - Updating the CATS web site (this capability is currently under construction)
- Not having updated contact information could result in a Master Contractor **not** receiving TORFPs

## PLEASE DO (cont.)

- Communicate only with the TO Procurement Officer during the TORFP process
- Submit Notice to Contractors if not submitting a TO Proposal
- Ask questions prior to submitting TO Proposals
- Attend the pre-proposal conference

## PLEASE DO (cont.)

- Address any Conflicts of Interest prior to and when submitting a TO Proposal
- Read the entire TORFP, including all attachments prior to the pre-proposal conference
- Follow required TO Proposal response format
- Provide separate technical and financial proposals

## PLEASE DO (cont.)

- Have MBE relationships established before submitting a TO Proposal
- Submit completed and signed MBE Forms D-1 and D-2 with the TO Proposal
- Reflect eMarylandMarketplace fees in the TO Financial Proposal
- Bring appropriate staff to oral presentations and let them participate

## PLEASE DO NOT

- Assume anything
- Contact other State personnel concerning a TORFP
- Submit a late TO Proposal
- Submit an alternate TO Proposal
- Submit a TO Proposal with a lot of gloss, cut down on preparation expenses
- Submit marketing materials, would not be used in the evaluation

## PLEASE DO NOT (cont.)

- Submit a TO Proposal without the required MBE Forms, D-1 and D-2
- Perform any work not specified in the TORFP scope, unless a change order is executed by the TO Procurement Officer **first**

# Questions?